

## PERSONAL TAX DEDUCTIONS

NAME \_\_\_\_\_ YEAR \_\_\_\_\_

Please indicate the amount of deductions for which you, your spouse or dependents qualify:

### COMMON DEDUCTIONS

Home mortgage interest, Loan No. 1 ..... \$ \_\_\_\_\_  
Home mortgage interest, Loan No. 2 ..... \$ \_\_\_\_\_  
Home equity loan interest ..... \$ \_\_\_\_\_  
Pre-payment penalty / Loan point ..... \$ \_\_\_\_\_  
Real estate taxes..... \$ \_\_\_\_\_  
Auto & boat licenses (DMV) ..... \$ \_\_\_\_\_  
State income taxes..... \$ \_\_\_\_\_  
Cash/Check donations (less than \$250.00) ..... \$ \_\_\_\_\_  
Donations (more than \$250.00 at one time) ..... \$ \_\_\_\_\_  
Donation of properties (Value) ..... \$ \_\_\_\_\_

### DEDUCTIONS WITH LIMITATION

Medical expenses (>7.5%) ..... \$ \_\_\_\_\_  
Casualty / Theft losses (>10%) ..... \$ \_\_\_\_\_  
Investment expenses ..... \$ \_\_\_\_\_  
Job related expenses (>2%) ..... \$ \_\_\_\_\_  
Miscellaneous expenses (>2%) ..... \$ \_\_\_\_\_  
Others (list on the back) ..... \$ \_\_\_\_\_

### ADJUSTMENTS AND CREDITS

IRA contributions ..... \$ \_\_\_\_\_  
Health insurance ..... \$ \_\_\_\_\_  
Alimony paid..... \$ \_\_\_\_\_  
Moving expenses ..... \$ \_\_\_\_\_  
Tuition and fees..... \$ \_\_\_\_\_  
Student loan interest ..... \$ \_\_\_\_\_  
Child care expenses..... \$ \_\_\_\_\_  
Others: 1) ..... \$ \_\_\_\_\_  
2)..... \$ \_\_\_\_\_  
Questions about any other \_\_\_\_\_

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Student loan interest..... \$ \_\_\_\_\_  
Child care expenses ..... \$ \_\_\_\_\_  
Others: 1) ..... \$ \_\_\_\_\_  
3)..... \$ \_\_\_\_\_  
Questions about any other \_\_\_\_\_

## BUSINESS INCOME STATEMENT

NAME \_\_\_\_\_ YEAR \_\_\_\_\_

Please indicate the amount of income and expenses you incurred during the year.

### INCOME

January .....	\$	_____
February .....	\$	_____
March .....	\$	_____
April .....	\$	_____
May .....	\$	_____
June .....	\$	_____
July .....	\$	_____
August .....	\$	_____
September .....	\$	_____
October .....	\$	_____
November .....	\$	_____
December .....	\$	_____
<b>FORMS 1099-MISC</b> .....	\$	_____
<b>TOTAL</b> .....	<b>\$</b>	_____

### EXPENSES

<b>MATERIALS</b> (for customers) .....	\$	_____
Supplies (for general use) .....	\$	_____
Advertising .....	\$	_____
Taxes and licenses .....	\$	_____
Telephone .....	\$	_____
Insurance .....	\$	_____
Utilities .....	\$	_____
Repair .....	\$	_____
Disposals .....	\$	_____
Property Rent .....	\$	_____
Equipment .....	\$	_____
Fees or sub-contracts .....	\$	_____
Others (List on the back) .....	\$	_____
Car & Truck (or Mileages) .....	\$	_____
<b>Or Total Expenses (if &lt; \$5,000)</b> .....	<b>\$</b>	_____

## BUSINESS INCOME STATEMENT

NAME \_\_\_\_\_ YEAR \_\_\_\_\_

Please indicate the amount of income and expenses you incurred during the year.

### INCOME

January .....	\$	_____
February .....	\$	_____
March .....	\$	_____
April .....	\$	_____
May .....	\$	_____
June .....	\$	_____
July .....	\$	_____
August .....	\$	_____
September .....	\$	_____
October .....	\$	_____
November .....	\$	_____
December .....	\$	_____
<b>FORMS 1099-MISC</b> .....	\$	_____
<b>TOTAL</b> .....	<b>\$</b>	_____

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<b>MATERIALS</b> (for customers) .....	\$	_____
Supplies (for general use) .....	\$	_____
Advertising .....	\$	_____
Taxes and licenses .....	\$	_____
Telephone .....	\$	_____
Insurance .....	\$	_____
Utilities .....	\$	_____
Repair .....	\$	_____
Disposals .....	\$	_____
Property Rent .....	\$	_____
Equipment .....	\$	_____
Fees or sub-contracts .....	\$	_____
Others (List on the back) .....	\$	_____
Car & Truck (or Mileages) .....	\$	_____
<b>Or Total Expenses (if &lt; \$5,000)</b> .....	<b>\$</b>	_____

## RENTAL INCOME STATEMENT

NAME \_\_\_\_\_ YEAR \_\_\_\_\_

PROPERTY \_\_\_\_\_

Please indicate the amount of income and expenses you incurred during the year.

### INCOME

January .....	\$	
February .....	\$	
March .....	\$	
April .....	\$	
May .....	\$	
June .....	\$	
July .....	\$	
August .....	\$	
September .....	\$	
October .....	\$	
November .....	\$	
December .....	\$	
HOUSING AUTHORITY .....	\$	
<b>TOTAL</b> .....	<b>\$</b>	

### EXPENSES

Mortgage interest .....	\$	
Property taxes .....	\$	
Insurance .....	\$	
Utilities .....	\$	
HOA fees .....	\$	
Equipment .....	\$	
Maintenance & Repair .....	\$	
Professional fees .....	\$	
Supplies .....	\$	
Others (list on back) .....	\$	
Car & Truck (or Mileages) .....	\$	
DEPRECIATION .....	\$	
<b>TOTAL</b> .....	<b>\$</b>	

## RENTAL INCOME STATEMENT

NAME \_\_\_\_\_ YEAR \_\_\_\_\_

PROPERTY \_\_\_\_\_

Please indicate the amount of income and expenses you incurred during the year.

### INCOME

January .....	\$	
February .....	\$	
March .....	\$	
April .....	\$	
May .....	\$	
June .....	\$	
July .....	\$	
August .....	\$	
September .....	\$	
October .....	\$	
November .....	\$	
December .....	\$	
HOUSING AUTHORITY .....	\$	
<b>TOTAL</b> .....	<b>\$</b>	

### EXPENSES

Mortgage interest .....	\$	
Property taxes .....	\$	
Insurance .....	\$	
Utilities .....	\$	
HOA fees .....	\$	
Equipment .....	\$	
Maintenance & Repair .....	\$	
Professional fees .....	\$	
Supplies .....	\$	
Others ( List on back) .....	\$	
Car & Truck (or Mileages) .....	\$	
DEPRECIATION .....	\$	
<b>TOTAL</b> .....	<b>\$</b>	